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Foreign Crops and MARKETS

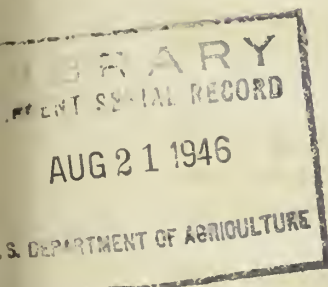


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Larger European Wheat Crop in Prospect This Year, But Conditions are Least Favorable in Normally Surplus-Producing Regions (Page 91)

Philippines Agree to Sell Entire Exportable Surplus of Copra, Coconut Oil to the United States for 1 Year (Page 93)



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L A T E N E W S

Total Cuban sugar production from the 1946 harvest, according to preliminary estimates, is now placed at 4,476,000 short tons of raw sugar and about 245 million gallons of blackstrap molasses. Prospects for 1947 are excellent as a result of good rainfall during the spring and early summer and some increase in the acreage planted to cane. The contract for the purchase of Cuba's 1946 and 1947 sugar crops was signed on July 16 and assures the United States maximum quantities of Cuba's sugar at 3.675 cents per pound of raw sugar, f. o. b. Cuban ports, with provisions for increases in the price principally in the event that indices of living costs and foodstuff prices in the United States rise above the average of the fourth quarter of 1945. The contract also covers the purchase by the United States, during a 2-year period of a minimum of 280 million gallons of blackstrap molasses and 40 million gallons of industrial alcohol.

Drought damage in Rumania is threatening the corn and sunflower crop. Late corn is being harvested for fodder. Lack of pasture is causing drastic reduction in livestock numbers.

Turkish bread rations were abolished in all areas except in Istanbul, Ankara, and Izmir on July 19. However, bread rationing may be carried out locally at the discretion of the local authorities.

The Cuban Cabinet approved in principle the establishment of a tobacco stabilization fund, the chief function of which will be to buy surplus tobacco and thus prevent prices to growers from dropping below legal levels. Surplus leaf-tobacco purchases under the fund are to begin in November 1946, according to the proposal. The fund reportedly is to be obtained from a price increase of 1 cent on each package of cigarettes.

Haiti is confronted with a severe shortage of edible fats and laundry soap. Domestic stocks of fats and cooking oils are expected to be completely exhausted by the end of the current month. The shortage of laundry soap is equally critical.

Philippine Act. No. 728 recently established the requirement of a permit for the exportation of agricultural or industrial products to all destinations and provided a heavy penalty for any violation. The act will be in force until December 31, 1948, unless terminated by the Government at a prior date.

Nicaragua suspended the issuance of export licenses for all foodstuffs. Existing licenses were canceled covering products which remained unshipped after August 2, 1946.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS, AND FEEDS. 1/EUROPEAN WHEAT-CROP
PROSPECTS FAVORABLE

Present prospects are for a European wheat crop considerably larger than the reduced 1945 production, but still substantially below average. Wheat crops larger than those of a year ago are expected from most areas, but the largest gains are indicated throughout the Mediterranean area and in parts of western Europe, - on the basis of available information.

Wheat-production estimates show an increase of nearly 30 percent over last year's small outturn in the countries for which preliminary information has been received. The countries exporting in 1945 represented more than 60 percent of the European wheat production.

Good crops in the Mediterranean area were the outcome of both increased seedings and more favorable weather than in 1945, when severe drought took a heavy toll of the wheat crop. Heavy rains in the late spring and early summer of the current year apparently did not damage the crop to the extent feared earlier, and outturns in these countries are not only much above those of a year ago, but for two countries are reported to be substantially above the 1935-1939 average. The crop in Spain, reported at 131 million bushels, is about 80 percent larger than the crop believed to have been harvested there in 1945. Though also above the 1935-1939 average, it is still somewhat smaller than production in pre-Civil War years.

The outturn in Portugal was reported at 21 million bushels. Later trade reports, however, state that harvest results are falling short of early expectations, and that the production may fall short of 19 million bushels. Even at that figure the crop would exceed the 1935-1939 average and would be about double the small 1945 crop.

In Italy wheat production is placed at 223 million bushels, or over 30 percent larger than the small crop of a year ago. It is, however, still somewhat less than the prewar-average production.

Weather conditions in western Europe were generally more favorable than in 1945, and the fertilizer shortage was also relieved to some extent. As a result, wheat prospects were substantially improved in 1946. An early season official estimate places the French crop at 225 million bushels, but it is believed that final returns show a larger crop. Even at the present figure, however, the outturn would be about 25 percent larger than the estimated crop in 1945. The crop in Belgium is officially

1/ The Grain Section is continued on page 100.

placed at about 12.6 million bushels, which as in the case of France, appears to be low.

Wheat production in the Netherlands reported at 10.9 million bushels is somewhat above last year's low outturn, but is still more than 25 per cent below average. Good yields are expected in Switzerland from an acreage at the relatively high level of 1945.

No production estimates have been received from northern European areas but the Scandinavian countries are reported as having about average prospects with little change from last year's relatively good crops expected. In Finland, however, the crop is expected to be below average, largely as a result of excessive rainfall.

Conditions in central and eastern Europe are relatively the least favorable on the Continent. The lack of rainfall over much of this area in spring and early summer is reported to have caused extensive crop damage though rainfall later improved the outlook in parts of the area.

In Austria the wheat crop is estimated at 8.5 million bushels, or less than the small 1945 crop. In Czechoslovakia on the contrary the crop estimated at 50 million bushels would approach average. Crop prospects in Czechoslovakia are, however, the most favorable of the countries in this area. The outlook in both Poland and Germany seems unpromising. In Poland unfavorable weather, together with manpower and draft power shortages, have affected prospects. In addition land reforms and large population shifts are factors contributing to the unfavorable outlook.

In Germany weather conditions have been unfavorable and fertilizer, which has always been of great importance in the country's intensive cultivation of prewar years, is in short supply throughout the country.

In the Balkan countries crop conditions are generally more favorable than they were a year ago. Most favorable conditions are reported for Bulgaria, while those for Hungary appear least promising. The crop in Hungary, reported at the low figure of 35 million bushels, though considerably larger than the 1945 harvest, is not much more than a third of the 1935-1939 average. Greater disruption to farm operation was reported from this country than in others of that area. Weather conditions were also less favorable than in the other Balkan countries.

The crop in Rumania, officially placed at about 70 million bushels, would be only half of the 1935-1939 average and slightly smaller than the crop believed to have been harvested last year, whereas prospects had pointed to a good harvest in that country and in Yugoslavia. Production in Greece, reported at about 24 million bushels, compares favorably with the crop believed to have been harvested in 1945, though below the prewar outturns.

The outlook for the crop in the Soviet Union varies in different areas, but the overall yields, based on latest conditions, are not expected to

exceed the low average of recent years. Wheat production, therefore, appears likely to be considerably below the prewar level, since acreage is also smaller than in the prewar years.

The crop in Eire is reported at about 20 million bushels, compared with 21 million bushels a year ago. Wheat growing has expanded in Eire during the war years while the country was cut off from its usual imports. Production in 1946 is about 2-1/2 times the prewar volume. The condition of the crop in the United Kingdom was above the 10-year average and also somewhat better than in 1945 as of July 1. The yield was expected to be about average on an acreage of 1,191,000 acres, compared with a prewar average of 1,843,000 acres and the 1945 area of 2,274,000 acres.

EUROPE: Prospective wheat production, selected countries,
1946 with comparisons

Country	Average 1935-1939	1944	1945	Prospective 1946
	: 1,000 : bushels	: 1,000 : bushels	: 1,000 : bushels	: 1,000 : bushels
Eire	7,689	20,388	21,394	19,621
Spain	157,936	106,556	(73,000)	131,174
Portugal	16,066	13,525	10,913	21,164
Italy	279,519	236,454	(169,019)	222,665
Austria	15,117	11,464	8,929	8,481
Czechoslovakia	59,090	45,600	45,000	b/(50,000)
France	286,510	256,285	(184,000)	225,000
Belgium	16,150	18,569	(14,500)	(12,603)
Netherlands	15,209	11,868	7,953	10,900
Hungary c/	91,210	81,830	22,230	34,980
Rumania	140,316	-	-	69,555
Greece	30,205	-	(16,800)	23,883
Estimated total d/	1,115,567	926,000	647,000	830,000
	:	:	:	:

From official and unofficial sources where available; otherwise OFAR estimates (shown in parentheses) based on foreign service reports and other information.

a/ Production for 1935 only. b/ Not strictly comparable with preceding estimates since Ruthenia is excluded. c/ Based on present boundaries for 1944, 1945, and 1946. Preliminary for 1945. d/ Estimated totals for 1944, 1945, and 1946, include allowances for missing data for countries shown.

FATS AND OILS

U. S., PHILIPPINES SIGN COPRA PURCHASE AGREEMENT

Under terms of an agreement signed August 8, the Philippine Government and the United States Government have agreed to sell the entire exportable

surplus of copra and coconut oil to the Commodity Credit Corporation or its designee for 1 year beginning July 1, 1946. Prices, f. o. b., set at \$103.50 per long ton for copra and 7-1/8 cents per pound for coconut oil, are subject to review by either party at any time during the period specified. Of the total United States imports of copra in prewar years, 95 percent originated in the Philippines, and almost 100 percent of the coconut oil came from the same source. Two-thirds of the coconut oil consumed in this country before the war was used in the manufacture of soap.

The Philippine Government will grant export licenses only to countries having an International Emergency Food Council allocation, with purchases for foreign claimants made by the Fats and Oils Branch, U. S. Department of Agriculture, through normal trade channels. United States imports of copra will be purchased by private firms, with control by import licenses.

In each succeeding month since January 1946, copra shipments from the Philippines have risen. The largest shipments were in July when about 60,000 long tons were lifted. This quantity is around seven times larger than January shipments and approximates the prewar exports. This remarkable recovery was made possible through the efforts of the Copra Export Management Corporation and the Philippine Government. In reestablishing the copra industry the United States furnished inter-island boats, warehousing facilities, land transportation, and incentive goods.

In prewar years the Philippines were the largest single exporter of copra and coconut oil in terms of copra. For many years the United States was the most important market for these commodities. In 1934-1938, exports of coconut oil to the United States averaged 339 million pounds annually, 96 percent of exports to all countries. Exports of copra to the United States in the same period averaged 432 million pounds, 67 percent of total copra exports.

In 1938 there were about 139 million coconut trees in the Philippines, of which 60 percent were in bearing, 39 percent nonbearing, and about 1 percent tapped for tuba (a native drink). Coconuts accounted for about 27 percent of the total cultivated area, being second only to rice. They are cultivated or collected in all of the coastal areas and islands, except on Luzon north of Manila, and on several small islands in the central part of the archipelago. Southern Luzon, especially in the southeastern part is the most important producing region.

BRAZIL'S BABASSU OUTPUT ABOVE PREWAR AVERAGE

Brazilian babassu-kernel production for 1946 is now estimated at 60,000 short tons. Although smaller than anticipated, the outturn is 10 percent greater than that of last year and the largest since 1942. Despite increased production, however, exports of kernels and oil in terms of kernels may be less than the shipment of 50,000 tons in 1945. This expected decline is due primarily to increased domestic consumption.

The United States and Brazilian Governments recently extended the original (1942) Babassu Agreement, with some modifications, until June 30, 1947, under which Brazil agrees to maintain, during this period, an export restriction on babassu kernels and oil, limiting the export of these products to the United States or to consignees designated by an official agency of this Government. The Brazilian Government is to make available for export one-half of the total production of kernels and oil at prices and ports specified. The prices for kernels of fair average quality range from \$141.50 per metric ton (\$128.40 per short ton) to \$143.00 (\$129.75) in bags, net weight, f. o. b. ocean-going steamer depending on the port. Babassu oil is \$11.00 per 100 pounds in bulk and \$12.00 in drums, net weight, f. o. b. ocean-going steamer at specified ports.

DUTCH RAPESEED AREA
LARGER THAN PREWAR

The Netherlands rapeseed acreage for 1946 is now placed at only 9,711 acres, a decrease of 87 percent from that of last year, but an increase of 125 percent over the prewar (1935-1939) average. Rapeseed is the principal domestic source of edible oil in the Netherlands, and, during the war, the acreage for this crop was increased to almost 12 times the prewar average. However, poor yields and insect damage in recent years resulted in a striking decrease in acreage for 1946. In addition, many planted areas were ploughed after the drought last spring.

The flaxseed area is estimated at 29,500 acres, an increase of 27 percent over that sown in 1945, but a decrease of 30 percent from the 1935-1939 average.

NETHERLANDS: Oilseed acreage,
1946 with comparisons

Year	Rapeseed	Flaxseed	Poppysseed
	<u>Acres</u>	<u>Acres</u>	<u>Acres</u>
Average -			
1935-1939	4,322	42,338	3,015
1940-1944	52,536	43,816	10,724
1945	85,709	23,289	6,012
1946	9,711	29,506	15,874

Compiled from official sources.

The 15,874 acres sown to poppyseed shows an interest of 164 percent over the 1945 acreage and 427 percent over the prewar average. Unfavorable weather conditions, however, have decreased the yield per acre of all oilseed crops.

* * * * *

TOBACCOGREEK TOBACCO CROP
DOUBLE 1945 HARVEST

Recent estimates placed the 1946 tobacco harvest in Greece at about 100 million pounds from 157,000 acres. The 1946 crop is expected to be nearly double the 1945 harvest of 53 million pounds, but about 25 percent below the prewar (1935-1939) average production of 133 million pounds. The condition of the current crop was reported in mid-July as generally excellent, and harvesting was already underway.

Exports of Greek leaf during the past 2-1/2 years have been at low levels. During the first half of 1946, only 8 million pounds were shipped abroad. In addition, about 3 million pounds of manipulated leaf held by the Greek Government were purchased by foreign countries during the January-June period, but remained unshipped on June 30. Prices received for American grades average about \$1.07 per pound. Prices for European grades ranged around 82 cents per pound.

During the prewar (1935-1939) period, Greece exported about 98 million pounds of tobacco annually, chiefly to Germany and the United States. Egypt, Belgium, Austria, Czechoslovakia, and Finland also took considerable quantities. The loss of the important German market has made the disposal of Greece's tobacco surplus difficult. Efforts are being made, however, to reopen trade with France, Austria, Czechoslovakia, Tunisia, and several other countries.

Despite increased domestic consumption, large stocks of leaf tobacco remained in Greece as of June 30. Total stocks amounted to about 66 million pounds, of which 16 million consisted of manipulated leaf. Reports indicate that only 850,000 pounds of the manipulated leaf from the 1943 and earlier crops consisted of American grades. From 5 to 8 percent of the 13 million pounds of manipulated leaf from the 1944 and 1945 crops were of American grades. Stocks of unmanipulated leaf, nearly all from the 1944 and 1945 crops, totaled about 50 million pounds.

EIRE'S TOBACCO
IMPORTS RISE

Leaf tobacco imports into Eire for the first 3 months of 1946 amounted to 3,673,000 pounds, or about 31 percent more than the 2,810,000 pounds imported during the same period a year ago. The United States supplied about 98 percent of the imports during the first quarter of 1946. Imports of tobacco products, chiefly cigarettes from the United Kingdom and Canada, totaled 94,000 pounds during the first 3 months of 1946, compared with only 26,000 during the first quarter of 1945. The increased imports of leaf tobacco raised bonded stocks to 12.7 million pounds on March 31, 1946, compared with 11.9 million on December 31, 1945.

Eire's tobacco growers planted only 83 acres this year, compared with 96 in 1945, and with an average of 543 acres during the prewar (1935-1939) period. Emphasis on the production of other crops, which bring more profitable prices, have discouraged farmers from maintaining their tobacco acreages.

COTTON AND OTHER FIBERS

EGYPT'S COTTON ACREAGE LARGER THAN LAST YEAR

The final official estimate placed Egypt's 1946 cotton acreage at 1,259,000 acres, compared with 1,020,000 in 1945. Acreage was composed of the following types (1945 comparisons in parentheses): Karnak - 849,000 acres (606,000); Ashmouni - 275,000 acres (210,000); Menouffi - 67,000 acres (40,000); Giza 7 - 53,000 acres (147,000); and others - 15,000 acres (17,000). The Nile flood this year is reported to be the most dangerous since 1892, and possibly the heaviest on record with a crest expected about August 20. Early flooding of basins is expected to cause loss of the second picking of cotton on about 20,000 acres of land as well as harvest of immature food crops and damage to levees.

Exports of cotton from Egypt during September-May 1945-46 were about the same as a year ago; 513,000 bales (of 473 pounds net) and 524,000 bales, respectively. Consumption during the 9 months under review amounted to 157,000 bales in 1945-46 and 156,000 in 1944-45. Stocks on hand at the end of May 1946 were slightly higher than a year ago; 2,123,000 and 2,092,000 bales, respectively.

Spot market prices for all varieties except Ashmouni and Zagora have been lower than the Government-support prices throughout most of the 1945-46 year, and most of the 1945 crop except those varieties was purchased by the Government.

BELGIAN FLAX AREA INCREASED FURTHER

The area planted to flax in Belgium for the 1946 crop shows an increase to 77,310 acres from the 1945 area of 60,140 acres, according to the May 15 census of the area under cultivation. Average flax acreage from 1930 through 1934 was about 35,000 but increased to about 75,000 acres for the following 5-year period. The smallest area of 20,550 acres was planted in 1942. A crop of nearly 318 million pounds of straw was harvested in 1945, with an expected output of possibly 80 million pounds of fiber.

WEEKLY COTTON PRICES ON FOREIGN MARKETS

The following table shows certain cotton price quotations on foreign markets, converted at current rates of exchange.

COTTON: Spot prices of certain foreign growths
and qualities in specific markets

Market location, kind, and quality	Date 1946	Unit of weight	Unit of currency	Price in: foreign currency	Equivalent U. S. cents per pound
Alexandria	:	:Kantar	:	:	:
Ashmouni, F.G.F.	: 8-8	: 99.05 lbs.	:Tallari	: 37.50	: 31.31
Giza 7, F.G.F.	: 8-8	: 99.05 bls.	:Tallari	: Not quoted	
Karnak, F.G.F.	: 8-8	: 99.05 lbs.	:Tallari	: 39.00	: 32.56
Bombay	:	:Candy	:	:	:
Jarila, fine	: 8-8	: 784 lbs.	:Rupee	: 450.00	: 17.71
Kampala, East African	: 8-8	: 784 lbs.	:Rupee	: 850.00	: 32.72
Buenos Aires	:	:Metric ton	:	:	:
Type B	: 8-10	: 2204.6 lbs.	:Peso	: 2060.00	: 27.82
Lima	:	:Sp. quintal	:	:	:
Tanguis, Type 5	: 8-10	: 101.4 lbs.	:Sol	: 181.00	: 27.46
Recife	:	:Arroba	:	:	:
Mata, Type 5	: 8-9	: 33.07 lbs.	:Cruzeiro	: 135.00	: 21.78
Sertao, Type 5	: 8-9	: 33.07 lbs.	:Cruzeiro	: 135.00	: 21.78
Sao Paulo	:	:Arroba	:	:	:
Sao Paulo, Type 5	: 8-9	: 33.07 lbs.	:Cruzeiro	: 170.50	: 27.51
Torreón	:	:Sp. quintal	:	:	:
Middling, 15/16"	: 8-9	: 101.4 lbs.	:Peso	: 121.25	: 24.62

Compiled from weekly cables from representatives abroad.

LIVESTOCK AND ANIMAL PRODUCTS

**BELGIAN CATTLE,
HOG NUMBERS UP**

Nearly all classes of livestock in Belgium, except milk cows, increased in the 12 months ending May 15, 1946, according to official estimates of that country. For the various species the 1946 numbers are as follows (1945 numbers in parentheses): Total cattle, 1,710,000 (1,628,000); milk cows, 776,000 (806,000); hogs, 839,000 (629,000); farm horses, 267,000 (250,000); and nonfarm horses, 43,000 (36,000). Sheep numbers have increased slightly, but there has been a decline in goats and rabbits. On account of incompleteness in reporting, actual hog numbers are believed to be about 200,000 head above official estimates. Likewise, the figure of 4,660,000 chickens (adult) reported is believed to be considerably below the actual number in Belgium.

**AUSTRALIAN DAIRY
PRODUCTS OUTPUT UP**

Total output of dairy products in Australia is continuing at a good level, owing in large part to high production in the important dairying State of Victoria. In the first half of 1946, the output of butter a-

mounted to 158 million pounds, compared with 139 million pounds for the same period of 1945. For the entire 1945-46 season (July-June), butter production totaled 325 million pounds, an increase of almost 18 million pounds over the quantity produced in the preceding year. Cheese production in the first half of 1946 was 40 million pounds, compared to 27 million pounds in the same 6 months of 1945. Output for the 1945-46 season amounted to 91 million pounds. Production a year earlier was 77 million pounds.

The prospects for increased dairy production in Australia in the 1946-47 season are considered unfavorable because of very dry conditions in Queensland and the northern coast of New South Wales.

ARGENTINE CATTLE HIDE EXPORTS DOWN

Exports of cattle hides from Argentina from January 1 through June 14, 1946, totaled 1,145,000 wet and 90,000 dried hides, according to unofficial estimates. In the comparable series a year earlier, the exports were 1,376,000 wet and 60,000 dried hides for this period. About half the exports this year were to the United Kingdom and 7 percent, about 81,000, to the United States, with the remainder going to European countries.

Following an increase of 15 percent in the ceiling price on frigorifico hides on May 9, the trade moved forward at the higher price until May 18 when the Government Export Control Department suspended the issuance of all export permits for hides, skins, and leather products. Some exports continued to mid-June on previously authorized permits. Since then the trade in hides has been at a standstill with no indication of an end to the embargo.

Estimates early this year indicated a production of 5,970,000 cattle hides in 1946 against 6,060,000 in 1945, with domestic consumption of about 2.8 million hides in both years.

NEW ZEALAND SHEEPSKINS BRING HIGHER PRICES

The remainder of the 1945-46 crop of sheep and lamb pelts, amounting to about one million skins, has been sold to Britain at prices over the old ceiling price. Extension of the bulk contract with the United Kingdom into the new season is now being considered on the following basis: Domestic tanners will have priority, and preference will be given Britain on a quantity large enough for essential needs but not so great as to permit reexport of the skins. Prices for the new contract have not been determined, but domestic price levels in the buying countries are expected to be a factor.

Similar considerations will control the distribution of calfskins, production of which is estimated at 850,000 for the 1946 season. Forward

sales and domestic requirements have already accounted for most of the production, and a supply of less than 100,000 is expected to be available to the United Kingdom and the United States.

GRAINS, GRAIN PRODUCTS, AND FEEDS (con't)

CANADIAN SPRING WHEAT
CONDITION UP 4 POINTS

The condition of spring wheat in Canada was reported at 126 on July 31, an increase of 4 points for the month and well above the condition of 92 reported on July 31 a year ago. Precipitation during the month was favorable in Manitoba and Saskatchewan but below normal in Alberta. Temperatures were normal or lower in all three Provinces.

Reports indicate, however, that the peak condition was probably reached during the week of July 22, and there has been some deterioration since that time. Frosts which occurred on the nights of July 22 to 24 in northern and central sections of Saskatchewan and Alberta caused some damage, although loss from this cause probably will not be as great as earlier reports indicated. Hot dry weather during late July and early August hastened maturity of the grain, and a reduction from earlier yield prospects is expected as a result. Latest information is that generally light to heavy rains accompanied by cooler weather have prevailed throughout the Prairie Provinces during the past week, and have helped to prevent further deterioration of the crop.

Acreage seeded to spring wheat in the Prairie Provinces in 1946 totaled 25,178,000 acres, an increase of 12 percent over a year ago when 22,566,000 acres were seeded. The first estimate of spring-wheat production is usually released in Canada in early September.

CANADA'S FALL WHEAT
CROP SEEN BELOW 1945

Production of fall wheat in Canada in 1946 was estimated at 16,052,000 bushels to be harvested from 546,000 acres. This is a reduction of about 20 percent from last year's crop of 20,115,000 bushels.

Yields per acre were well above average and nearly equal to those of a year ago, but the crop was harvested from an acreage considerably reduced from the 675,000 acres harvested in 1945. Grown almost entirely in the Province of Ontario Canada's fall-wheat crop is a very small part of the total wheat production--averaging about 5 percent or less of the total crop in most years.